Socrata Open Data Portal: Meeting Plan

Step	Session 1	Session 2	Session 3	Session 4	Session 5	Session 6	Session 7
Topic	Solution Design: Defining the Strategic Approach	Solution Design: Getting Tactical	Data Workshop(s)	Branding and Messaging	QA and Testing	Launch Planning and Launch	Project Transition
Prerequisites	• All major stakeholders and program participants present and engaged for Solution Design	• All major stakeholders present and engaged for kickoff	• Roadmap • Data Organizational Model • Data Inventory • Design Document (signed) • Project Plan and schedule • Metadata Standards	N/A	• Landing page and site styling in place • All content for soft launch in place & automated	• Landing page and site styling approved • All content completed, reviewed, and approved	• Program Launched
Attendees	• Customer Executive Sponsor • Customer Project Lead • Socrata PM	• Customer Project Lead • Customer Project Team • Customer Data Stewards • Customer Database Administrator • Socrata PM	• Customer Project Lead • Customer Data Stewards • Socrata PM	• Customer Executive Sponsor • Customer PR/Public Information • Customer Admin Team • Socrata PM • Socrata Developer	• Customer Executive Sponsor • Customer Project Manager • Customer Public Information / Marketing Team • Customer Data Analyst / Database Owner • Socrata Program Manager	• Customer Executive Sponsor • Customer Project Lead • Customer PR/Public Information • Socrata PM	• Customer Project Manager • Customer Executive Sponsor • Socrata Customer Success Manager • Socrata Account Executive • Socrata Program Manager
Agenda	• Introduction to Socrata PM • Reaffirm project goals and Critical Success Factors • Defining "launch" • Overview of program • Business overview: where are we now and where are we headed? • Review Digital Government Framework and identify location on trajectory • Define stakeholders and Critical Success Factors	• Develop data organizational model: map extraction, transformation ,and loading • Preparing the data: metadata and dataset standardization • Site design: identify homepage and visualizations needs • Project plan & timeline including launch	• Extract data in CSV format • Review data quality and identify cleaning required. Repair as needed. • Manipulate data into required format • Upload data • Data automation • Draft and build metadata	• Define and document design requirements	Review and QA: • Data • Metadata • Visualizations • User roles & permissions • QA of site styling and branding and sign-off on design	• Soft launch! Celebrate. • Create launch marketing plan • Review Program Roadmap and update to reflect current status	• Project Recap/Debrief • Present program roadmap • Introduction to Socrata Support • Review Socrata Support services • Introduction to CSM/AM • Review role of CSM
Action Items	• Finalize Solution Design Session agenda (as needed)	• Build, review, and approve: - 12 month Program Roadmap - Data Organizational Model - Data Inventory - Design Document • Finalize project plan and schedule remaining work	• Upload priority datasets • Finalize metadata standard • Finalize visualization plan for priority datasets	• Apply styling and branding to site • Customer team applies public facing content to site	• Varies, any work required to prepare for Soft Launch	• Launch activities planned • Implement 12 month Program Roadmap	• Execute on Program Roadmap
Deliverables	• Final Design Session agenda	• Data Organizational Model • Data Inventory • Design Document (signed) • Program Roadmap • Project Plan and schedule	• 1-3 datasets uploaded • Visualization plan • Metadata standard implemented and QA-ed=	• Complete site design	• Site testing complete • List of go-live critical issues & startegy for resolution within timeline	• Soft launch • Final 12 month Program Roadmap	

*Duration is project-specific. Typical range is 2-3 days.